

iSOFT

**i.nStock
User Guide**

V1.0.033.0

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3 iSOFT Connect

iSOFT Connect is PC based software that facilitates the exchange of data between the host PC and the PDA device.

iSOFT Connect must be running on the HOST PC when the exchange of data is taking place.

You must have Microsoft Active Sync installed on the PC running iSOFT Connect in order for communications to PDA's to operate correctly. Microsoft Active Sync is available for download from www.microsoft.com.

When the PDA is placed into the cradle, The PDA will connect with Microsoft Active Sync. You will be asked to set up a partnership. You should do this. It is required to be done once and once only.

Alternatively you can add the following registry key and this will prevent Microsoft Active Sync from requesting a partnership to be established every time.

```
[HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Windows CE Services]
"GuestOnly"=dword:00000001
```

Start iSOFT Connect. The following screen is presented. When minimised, iSOFT connect will appear as an ICON in the System Tray as follows



Double click the barcode Icon to restore as follows...



You will need to configure iSOFT Connect so that it operates as you expect it to. The default configuration is sufficient in most cases. See next section on PDT3100 and MC3000 differences.

3.1 PDT3100 vs MC3000 - Differences

There are DIFFERENCES between PDT3100/PDT6100 devices and the new MC3000 devices.

The MC3000 device has been designed to be EASIER to use and quicker to get i.Pharmacy reference data.

3.1.1 PDT3100 Process

The PDT3100 process was EXTREMELY time consuming. Each i.Pharmacy reference file needed to be EXPORTED from within i.Pharmacy and DOWNLOADED manually to each device. This took quite some time and it was easy to forget where you were up to.

Each PDT3100/PDT6100 required 6 or 7 files and may have taken anywhere from 10 – 30 minutes per device to load and get updated with the latest reference data.

3.1.2 MC3000 Process

The MC3000 process has been streamlined. iSOFT Connect is a small application that basically takes any data exported from within i.Pharmacy (at any time of the day irrespective of a device being connected to the i.Pharmacy PC or not) and prepares the data to be sent to the MC3000's.

You only need to export the data once (usually after changes have been made within i.Pharmacy). iSOFT Connect will then DISTRIBUTE the reference data to each MC3000 that requests reference data. This saves considerable time in ensuring the MC3000 devices have the latest reference data on them. The downloading of reference data can be done unattended and typically in about 2 – 4 minutes depending on the amount of data exported from i.Pharmacy.

Remember that you can EXPORT the i.Pharmacy reference data at any time of the day. The MC3000 can request the data at any time from iSOFT Connect. It does not need to be exported from i.Pharmacy for each device.

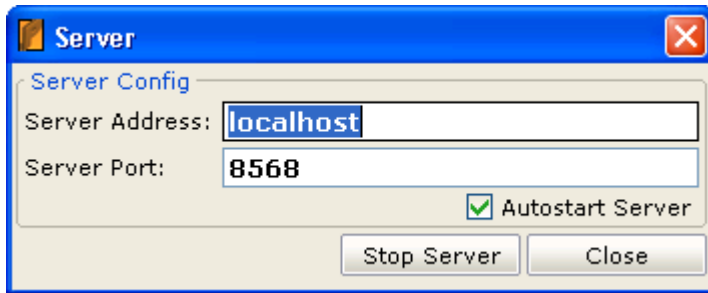
The DEFAULT setting for iSOFT connect should be left as they are. This is the MOST EFFICIENT configuration.

Note: Due to site differences the folder locations MUST be customised to local requirements.

3.2 Server Settings

Please ensure server settings are as follows. This is the default setting.

In most cases, these do NOT need to be changed. If you have a firewall running on your SERVER PC, you will need to unblock port 8568.



Port 8568 is set up to match the default PDA Port used.

3.3 Import / Export Settings

The Import / Export Settings are defined here.

The folder locations are unique to each site. In the example below the reference data from iSOFT back office system is C:\Projctcs\iSoft. The data file created when the PDA syncs with the PC is also C:\Projects\iSoft. These can be changed to individual site requirements.

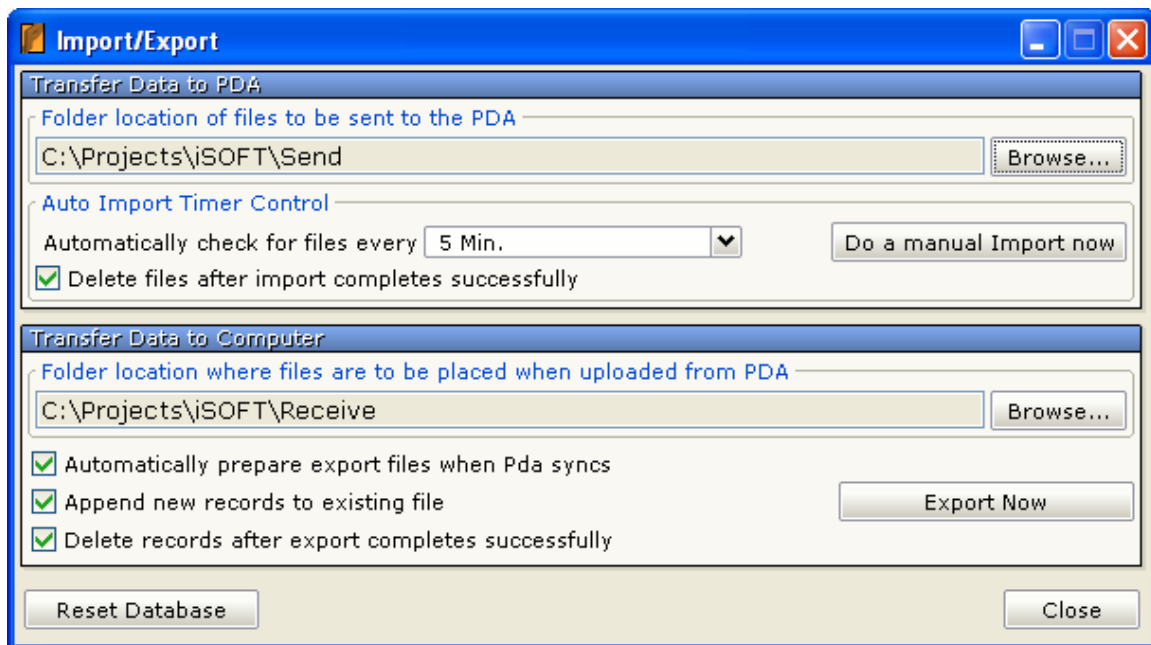
For the initial load to take place the following reference files must exist.

The expected files are as follows

Imp_id.txt
Imp_item.txt
Imp_loc.txt
Product.txt
Prod_UOM.txt
Str_loc.txt
Cst_cntr.txt

All these files MUST be present for the load. See iSOFT document

“MEL-9644 - Specifications - Barcode reader interface.doc” for details on File formats (input and output)

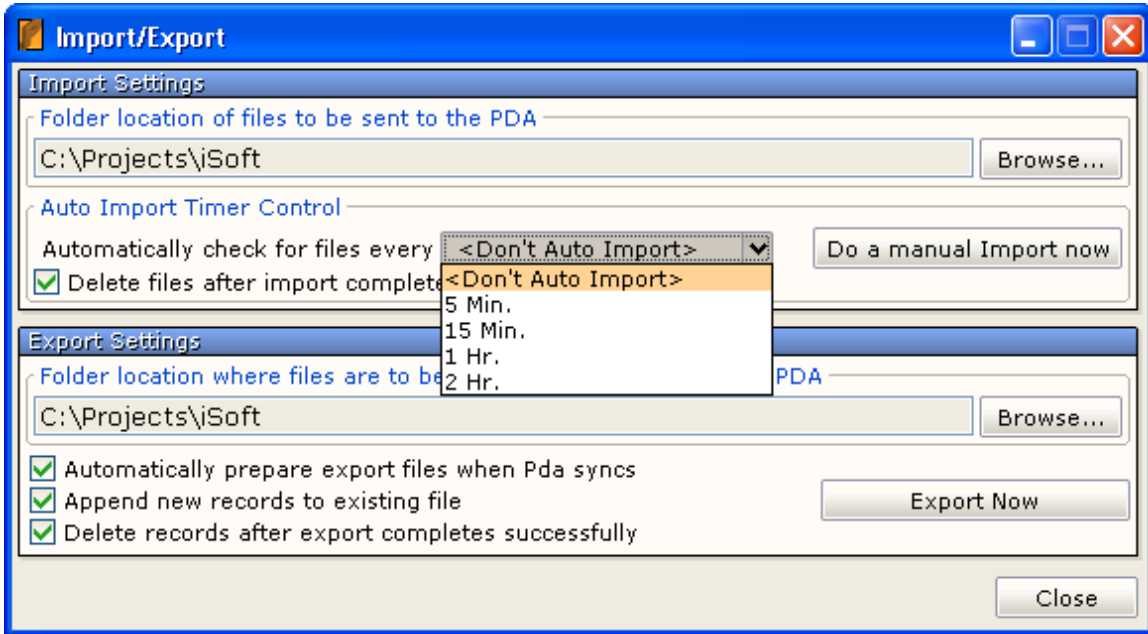


3.3.1 Auto Import Timer Control settings

3.3.1.1 Automatic Check

Automatically check for new reference data every X Minutes

Times available are as follows



Make a selection that suits your business requirements on how often the reference data is updated and made available to the PDA.

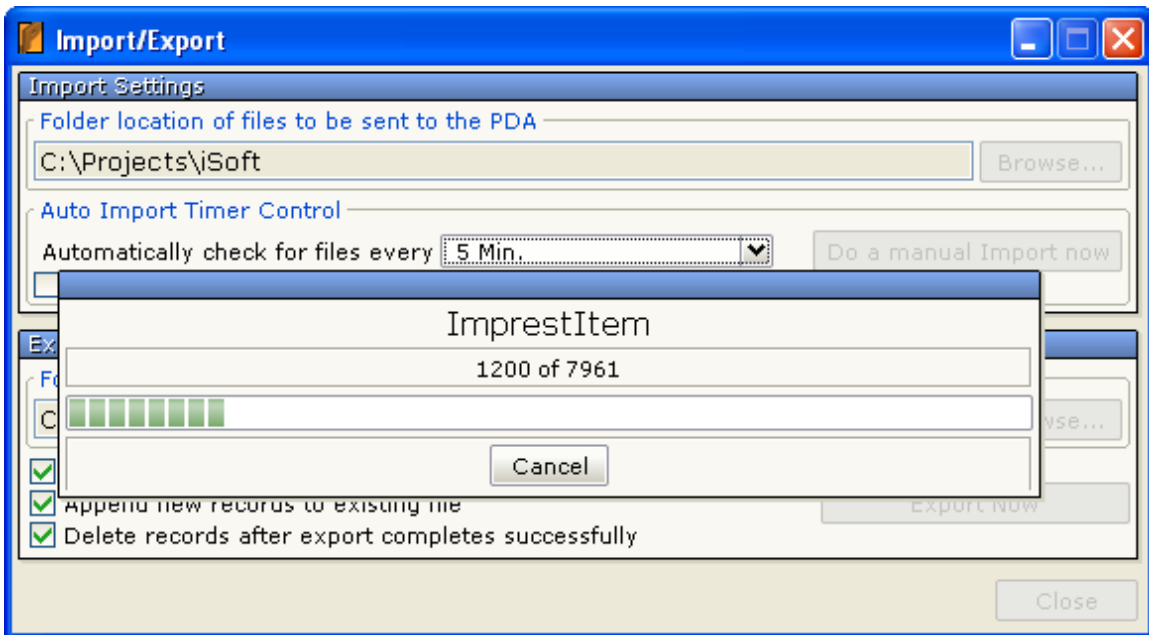
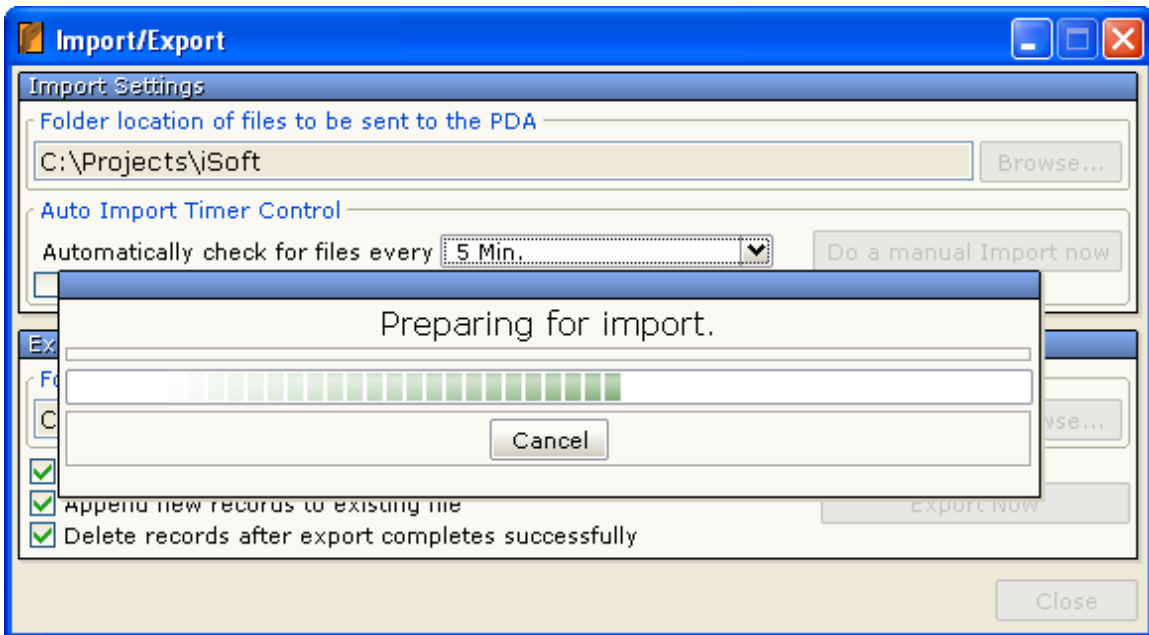
3.3.1.2 Delete files after import completes

If you have selected to automatically import every X minutes, then it is important to DELETE the files after import succeeds otherwise the same files will be imported again and again.

3.3.1.3 Manual import

If a new set of reference data has been made available, then you may IMPORT and PREPARE the data for immediate deployment to PDA's when they next sync by pressing the button "Do a manual Import Now".

You will see iSOFT Connect process the reference data as follows.



3.3.2 Preparation of OUTPUT data files

The following options are available in preparing the data files for the iSOFT Back Office system to process.

3.3.2.1 Automatically prepare export files when Pda Syncs

When a sync from PDA has completed, automatically generate the OUTPUT files that iSOFT Back Office will be able to process. The files will be placed into the nominated folder. Note: If the append new records option is NOT checked AND there are already existing output files, then iSOFT Connect will NOT export the currently syncing PDA's data to the OUTPUT Files. The data is NOT lost. It will be EXPORTED when either of the following events occurs.

- a) The existing OUTPUT files are processed and Removed by iSOFT Back Office system
- b) The "append new records to existing files" is checked and either the Export Now button is pressed or another PDA syncs its data.

3.3.2.2 Append new records to existing file(s)

If the output files already exist, then checking this option will ensure any new data arriving from the PDA will be appended to these files. If this option is not checked, the most recent data will NOT be exported and will remain in the Desktop PC database.

3.3.2.3 Delete records after export completes successfully

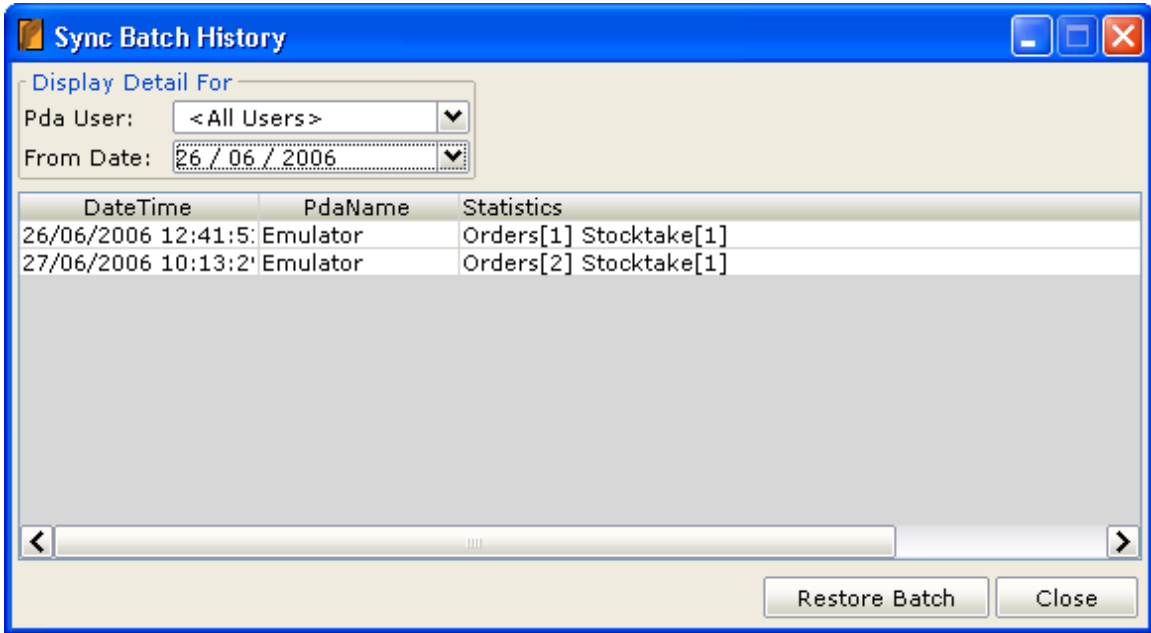
The data from the PDA can be stored in the database on the Desktop PC. Check this option to ensure it is removed once the output files have been created. If you do NOT remove the data then the NEXT attempt to create the OUTPUT files will include the previous data.

3.3.3 Reset Database

A reset database button exists to CLEAN up the iSOFT Connect underlying database. Use this button as a last resort to RESET the iSOFT Connect back to a "Clean" state.

3.4 Sync History

Should data from a specific terminal need to be made available again to the iSOFT back Office, then this may be achieved from within the Sync History Screen.



You can FILTER the list of PDA's by PDA ID and date if required. Once you have located the correct PDA and associated data to restore, click on the appropriate line, then press the Restore Batch button.



4 PDA Lists

Lists are used to select certain locations, imprest etc. All lists are displayed in a grid pattern that facilitates rapid selection of the required item. The list may be FILTERED by typing in details into the Text Box and pressing F9 or the ENTER Key.

By default all lists are displayed in alphabetical order. Other columns may be sorted as well by tapping on the column header. Column widths may be adjusted by locating the stylus on the junction between columns on the header row and dragging to the appropriate size OR by pressing F12.

4.1 Typical List

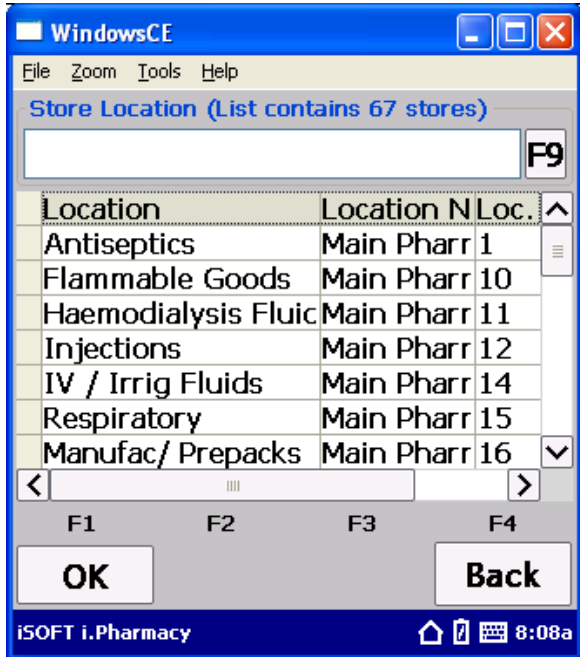


Options

Key	Description
F1	OK – Select the currently highlighted item
F4	Back – No selection is made. Return to Scanning screen
F9	Filter the list based on text in entry field
F12	Adjust Column Widths
↑	Move the highlight bar down one
↓	Move the highlight bar up one

4.2 Sorting

E.g. Sorting the list by tapping on Location Id



Options

Key	Description
F1	OK – Select the currently highlighted item
F4	Back – No selection is made. Return to Scanning screen
F9	Filter the list based on text in entry field
F12	Adjust Column Widths
↑	Move the highlight bar down one
↓	Move the highlight bar up one

4.3 Adjust Column Widths

Pressing F12 and adjusting Column Widths EXACTLY using PIXEL size. (Note Physical Screen Width is 320 Pixels)



Enter in the new widths. The List will now be redisplayed with the new column sizes.

Options

Key	Description
F1	Save the new column widths
F4	Back – Do NOT Save. Changes discarded.
ENTER	Move between headings of columns

4.4 Filtering

Looking for antiseptic locations...Type in a couple of characters and press F9 or ENTER. The list will be filtered displaying ONLY those locations that match the search criteria.



Options

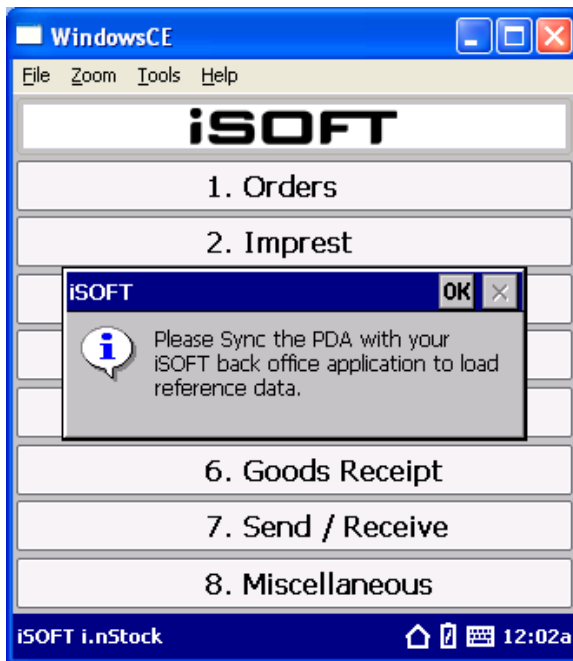
Key	Description
F1	OK – Select the currently highlighted item
F4	Back – No selection is made. Return to Scanning screen
F9	Filter the list based on text in entry field
F12	Adjust Column Widths
↑	Move the highlight bar down one
↓	Move the highlight bar up one

5 PDA

The following section discusses the generic options available on the PDA. The same options are basically available across all applications. The Orders application is used in the following example.

NOTE: The Main menu will NOT display if the PDA has not yet synced with the iSOFT Connect application and received the appropriate reference data from the iSOFT Back Office system

You will see the following message when the iSOFT PDA application is started.



Press OK and you will be taken to the Sync Screen as follows

Sync Screen



Press F1 to start the Sync Process. NOTE: iSOFT Connect MUST be running on the Host PC.

Data will transfer from Host PC to PDA



This may take a few minutes depending on the amount of data being transferred.



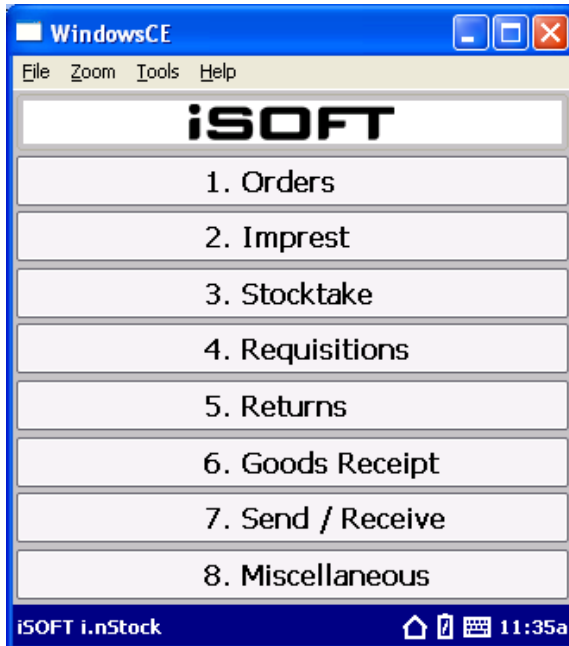
At the end of the process the user is informed if the sync has been successful. If an error has occurred the following screen will be displayed.



Make sure you have an active sync connection and that iSOFT Connect is running on your desktop PC.

5.1 Main Menu

The PDA main Menu is displayed below.



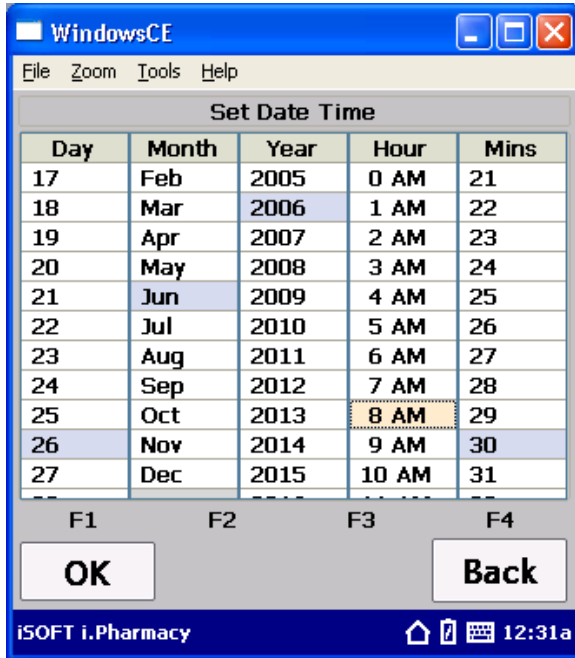
Options

Key	Description
1	Orders
2	Imprest
3	Stocktake
4	Requisitions
5	Returns
6	Goods Receipt
7	Sync
8	Miscellaneous
F6	Set Date and Time
F7	Configuration
F8	About Screen
F9	Exit Application

5.2 Setting Data and Time

From the main menu press F6

Use the ENTER key to Change COLUMNS. Use the UP and Down Arrow keys to select a row.



5.3 Connection Information

From the main menu press F7



Ensure the PORT setting matches the same port number iSOFT connect is listening on

The address should ALWAYS be ppp_peer unless communicating wirelessly in which case it should be the HOST IP or DNS address.

5.4 Application Navigation

All Applications (Orders, Stock take etc.) have a similar interface. The GENERIC interface for Orders is described here. The same concepts can be applied across all applications.



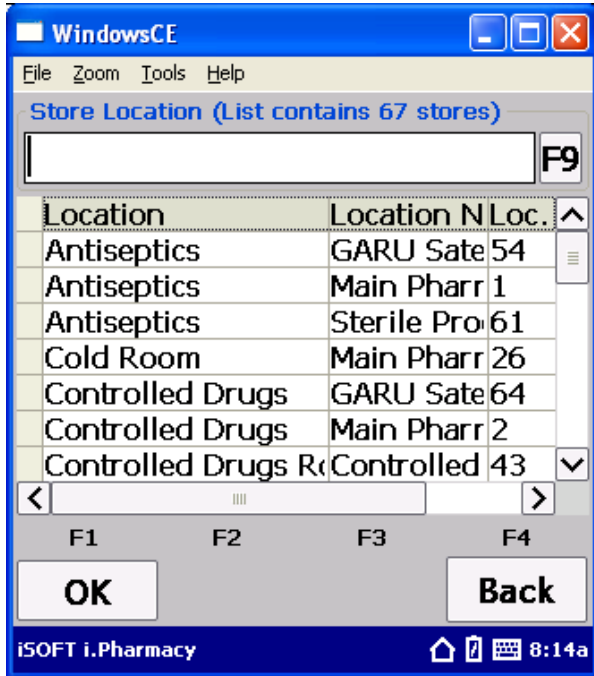
Each of the applications will display a summary at the bottom of the screen. This gives the operator a quick glance at what they are doing and which applications have data in them.

Key	Description
1	Create a new Collection or if a collection already exists, add to it.
2	Edit the collection data. May also be performed while creating / adding to the collection (as in option1 above)
3	Transfer Collection – This will take you to the Sync screen and allow data to be sent back to the iSOFT Back Office.
4	Erase data – Data may be erased entirely or filtered based on specific locations etc
5	Return to Main Menu.

5.4.1 Collection

If starting a new collection, you will be required to enter in a location. If adding to an existing collection, the last location used will be remembered and continue on from there.

5.4.1.1 Select a location



Options

Key	Description
F1	OK – Select the currently highlighted item
F4	Back – No selection is made. Return to Scanning screen
F9	Filter the list based on text in entry field
↑	Move the highlight bar down one
↓	Move the highlight bar up one

5.4.1.2 Scanning Items

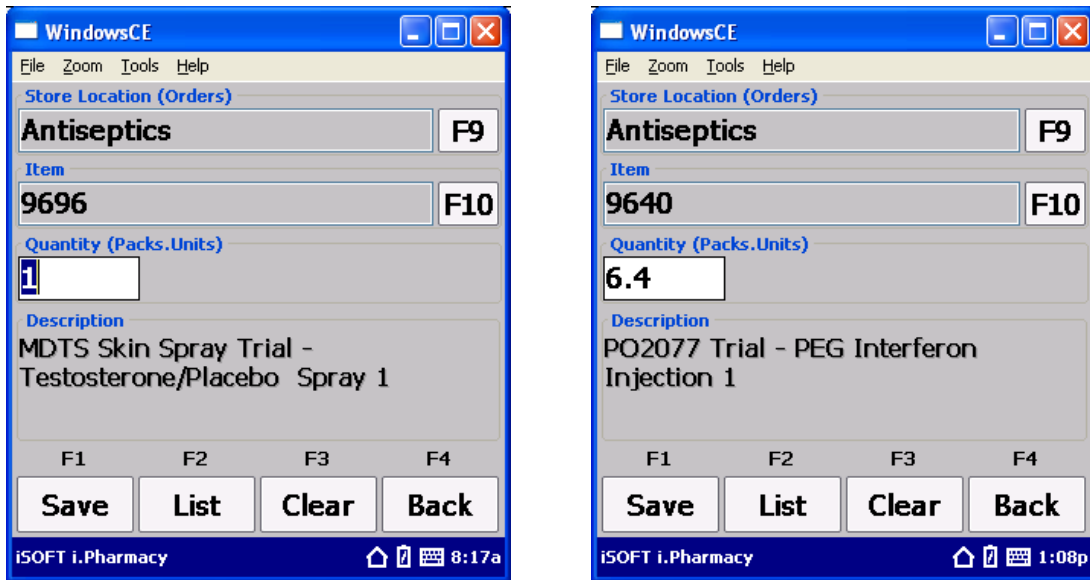
You may manually enter items, scan barcodes or select items from the list by pressing F10.



Options

Key	Description
F1	Save and clear the screen ready for next item
F2	List – Enter Review Mode
F3	Clear screen WIHOUT saving
F4	Go back to Menu
F9	Select another location
F10	Display product list and allow a product to be selected

When a valid item has been entered, then the description is displayed on the screen.



The cursor is waiting in the QTY field ready for the quantity to be entered. By default the quantity is one.

You may at this point

- a) Change the quantity. Use decimal point for Packs.Units where appropriate
- b) Scan a new item
- c) Exit or review etc.

The CURRENT item on the screen and its quantity will ALWAYS be saved. You do NOT have to press the SAVE button.

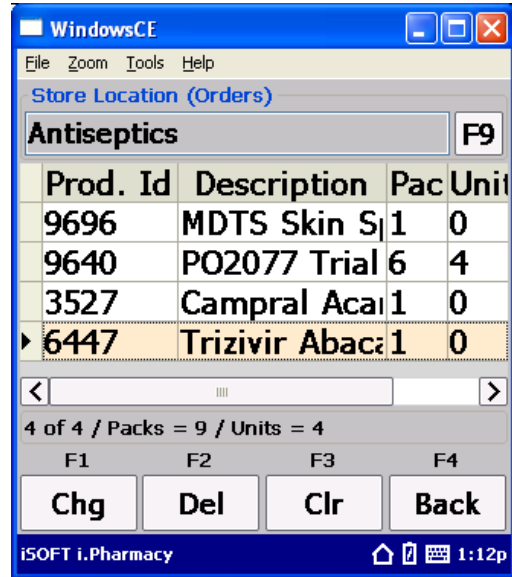
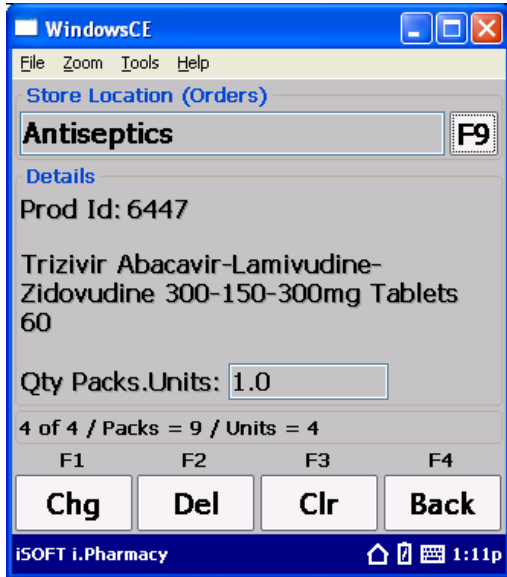
5.4.1.3 Review

Press F2 from the main scanning screen allows the user to list / review the items scanned so far.

The review screen can operate in single item mode or grid mode. Press F5 to toggle the modes.

Single Item Mode

Grid Mode

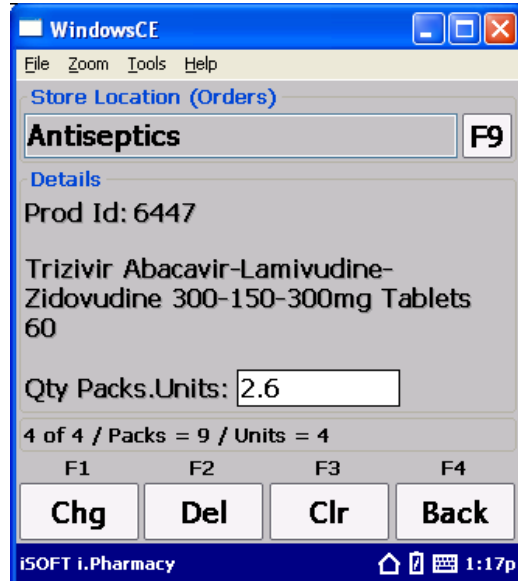
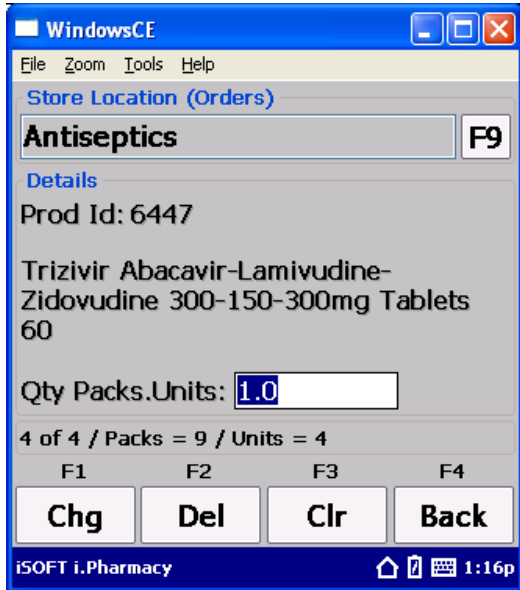


Options

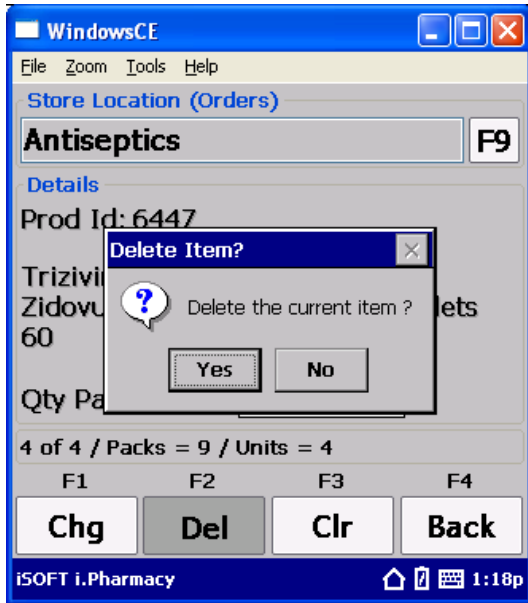
Key	Description
F1	Change the quantity
F2	Delete the currently displayed / highlighted item
F3	Clear ALL items in the current location. Note if no location is selected, the entire batch will be deleted.
F4	Go back to scanning screen
F9	Change Location
F11	Clear Filter. It is possible to scan a barcode while in review mode. When this happens the list will filter to show only those items that match the barcode. To RESET the display to show all items for the current location press F11
F12	Change Column Widths (if in Grid View mode)

5.4.1.3.1 Changing Quantity

Press F1 and enter in the new quantity. The new quantity is automatically saved.

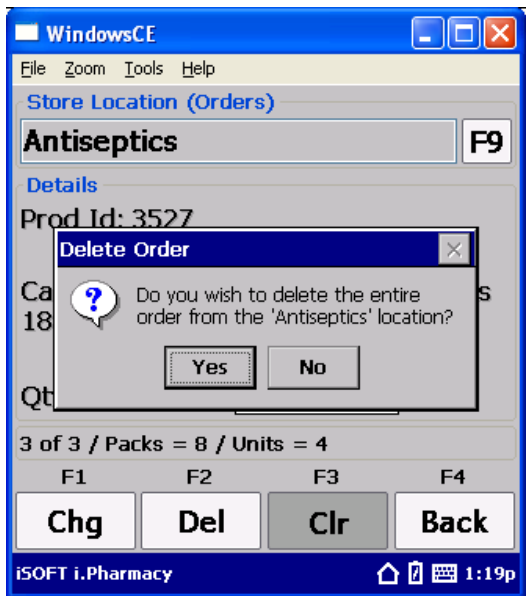


5.4.1.3.2 Delete current item



Press ENTER or tap YES to delete. Press No to leave current item intact.

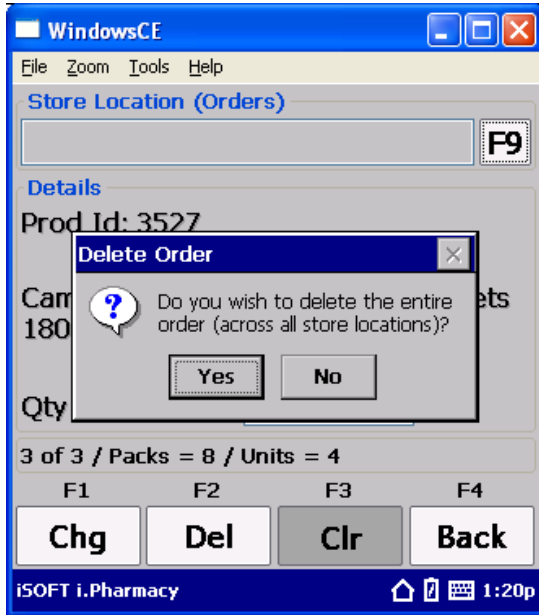
5.4.1.3.3 Delete entire batch from current location



Press ENTER or tap YES to delete. Press No to leave current batch intact.

5.4.1.3.4 Delete entire batch

Make sure NO location is selected. Press CLR.



Press ENTER or tap YES to delete. Press No to leave current batch intact.

5.4.2 Editing

Editing behaves EXACTLY the same as List / Review mode in the collection function. The ONLY difference when editing from this option is that no default location is specified.

For example, when entering the Review screen, there is no location selected. You must decide which location you wish to review (if any).



5.4.3 Transfer

When the data on the PDA needs to be sent back to the iSOFT Back Office system, the transfer option issued.

NOTE: Transfer will TRANSFER all data from all applications on the PDA.

When the transfer option is selected the operator is presented with the following screen.



Basically press F1 to start the Sync Process...

The PDA will start communicating with the iSOFT Connect application.



Upon Success the following screen is displayed.



5.4.4 Erase

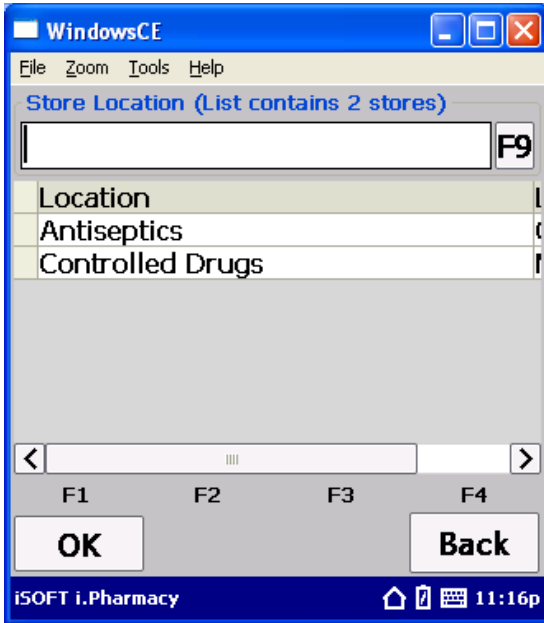
There are two ways to erase data. You can erase the entire batch or you may erase an entire location.



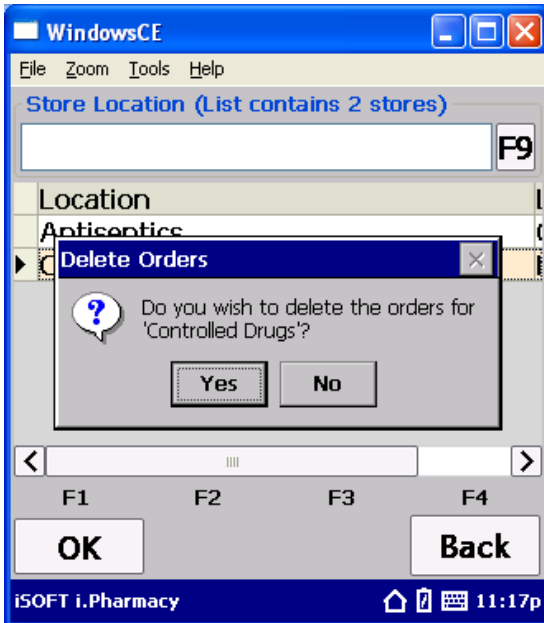
Option 1 will erase the entire batch as follows



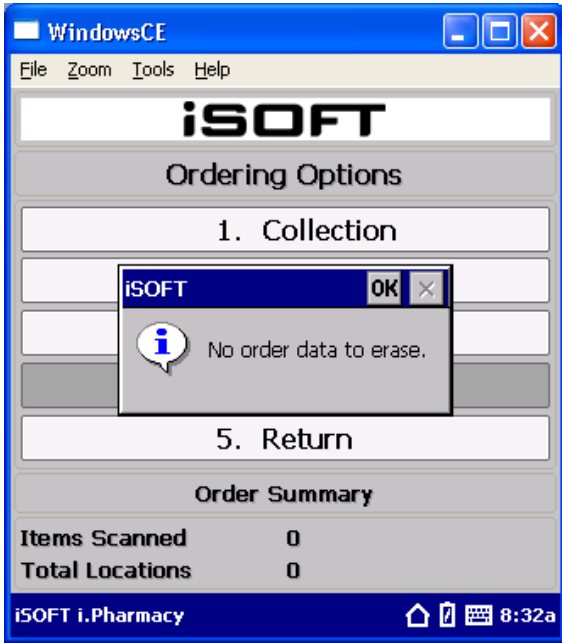
Option 2 will ask you to select a location within the current batch that you wish to erase.



Only those locations within the batch are displayed. Select an appropriate location.



If there is no data to erase then the operator is presented with the following message.



6 Send / Receive

Selecting option 7 from the main menu will present the operator with the following screen.



Available options are

Get the reference data – Any data that has been exported from i.Pharmacy will be placed on the PDA

Send Data to i.Pharmacy – This option allows you to send the CURRENT data and the PREVIOUS data send.

When option 2 is selected, the following screen is displayed.



You may send ALL CURRENT data or the PREVIOUS DATA that was sent LAST time you performed a Sync.

7 Configuration

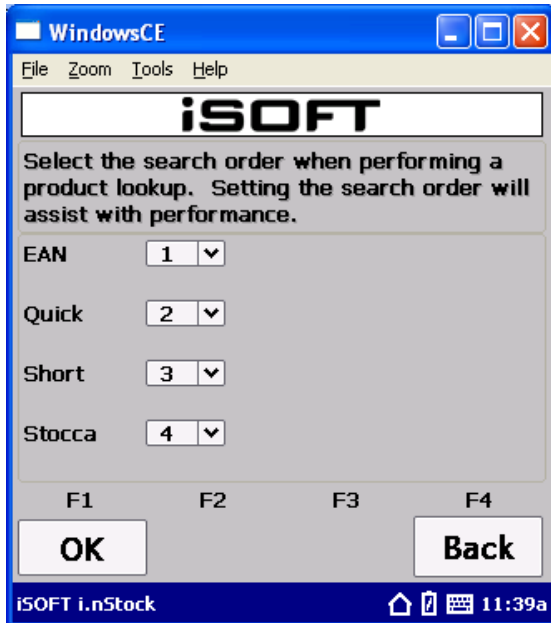
The PDA can be configured based on your local requirements. From the main menu select option 8 – Miscellaneous.

The following screen is displayed.



7.1 Set Search Order

You can configure the PDA to search for products in a particular order by setting the search order.

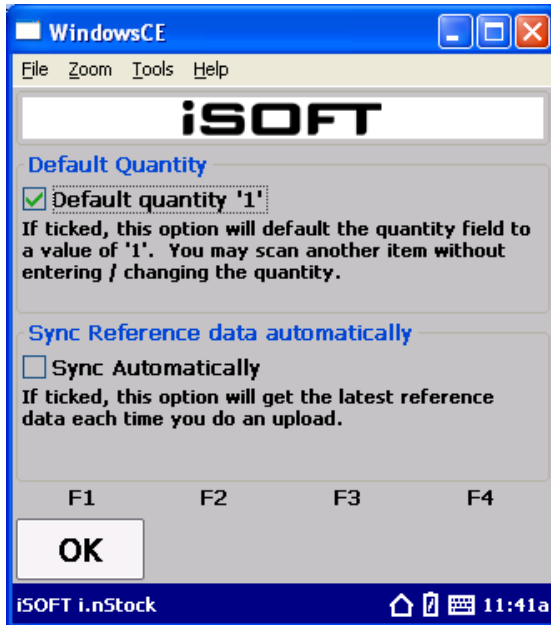


The default is displayed above. Firstly the PDA will search for the EAN code, then the quick code and then the short code and then the Stocca code.

If there is an EAN product number of 12345 and a Stocca Code of 12345, then the EAN product will be found first with the above configuration.

7.2 Config Options

The config option screen allows you to configure the behaviour of the PDA when requesting a quantity and syncing with the i.Pharmacy system.



7.2.1 Default Quantity

By Default the PDA will default the quantity after an item has been selected to a value of '1'.

If this option is 'unchecked', then the PDA will not default the quantity to 1. It will in fact leave the quantity BLANK. The user must enter in a quantity to have the current item actually recorded. If the user scans another barcode, the user will be warned that the current item has no quantity and asked if they would like to enter a quantity or discard the current item and work with the item just scanned.

7.2.2 Sync Reference Data Automatically

If this option is 'checked', then each time data is sent to the i.Pharmacy PC, then the PDA will refresh itself with the latest reference data from the i.Pharmacy PC that it is uploading the data to. By default this option is not enabled.